RevOps Dictionary

The Complete Reference for Revenue Operations

161 terms · 8 essays · 4 dashboards

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Dictionary (A–Z)

161 terms organized alphabetically

Essays

How to Evaluate Sales Performance

A framework for measuring what matters across the sales org

Sales performance is not one number. It is a system of interconnected metrics that reveal whether your team is healthy, productive, and improving. This essay connects the key RevOps metrics you need to evaluate a sales team properly.

Key Terms:

- **Quota Attainment**
  The percentage of assigned quota a sales rep or team achieves in a given period.
- **Win Rate**
  The percentage of qualified opportunities that result in a closed-won deal.
- **Pipeline Coverage**
  The ratio of total pipeline value to the revenue target for a given period.
- **Pipeline Velocity**
  The speed at which pipeline converts to revenue, factoring in deal count, value, win rate, and cycle length.
- **Sales Cycle Length**
  The average number of days from opportunity creation to closed-won.
- **Average Deal Size**
  The mean contract value of closed-won deals over a given period.
- **Revenue per Rep**
  The average revenue generated per quota-carrying sales representative.
- **Ramp Time**
  The time it takes for a new sales hire to reach full productivity, typically measured as months to first quota attainment.
- **Lead Response Time**
  The elapsed time between when a lead is created or assigned and when a rep makes first contact.
- **SQL-to-Close Rate**
  The percentage of Sales Qualified Leads that convert to closed-won deals.
- **Activity Metrics**
  Quantitative measures of sales activities such as calls made, emails sent, meetings booked, and demos completed.
- **Forecast Accuracy**
  The degree to which the sales forecast matches actual revenue outcomes.
- **MEDDPICC**
  A sales qualification framework that evaluates Metrics, Economic Buyer, Decision Criteria, Decision Process, Paper Process, Identify Pain, Champion, and Competition.
- **Quota-to-OTE Ratio**
  The ratio of a rep's annual quota to their on-target earnings, used to evaluate whether quotas are set appropriately relative to compensation.

Understanding SaaS Unit Economics

The metrics that tell you whether your business model actually works

Unit economics answer a simple question: does this business make money? Not at the P&L level, but at the individual customer level. This essay connects the metrics that reveal whether your SaaS model is fundamentally sound.

Key Terms:

- **Customer Acquisition Cost (CAC)**
  The total cost of acquiring a new customer, including all sales and marketing expenses.
- **LTV (Customer Lifetime Value)**
  The total revenue a company expects to earn from a customer over the entire duration of the relationship.
- **LTV:CAC Ratio**
  The ratio of customer lifetime value to customer acquisition cost, measuring the return on acquisition investment.
- **CAC Payback Period**
  The number of months it takes to recover the cost of acquiring a customer through their recurring revenue contribution.
- **Gross Margin**
  The percentage of revenue remaining after subtracting the cost of goods sold, measuring core delivery profitability.
- **Net Revenue Retention (NRR)**
  The percentage of recurring revenue retained from existing customers after accounting for expansion, contraction, and churn.
- **Churn Rate**
  The rate at which customers cancel their subscriptions or stop doing business with a company over a given period.
- **Expansion MRR**
  Additional monthly recurring revenue generated from existing customers through upsells, cross-sells, and plan upgrades.
- **Burn Multiple**
  The ratio of net cash burned to net new ARR added, measuring how efficiently a company converts spending into growth.
- **Rule of 40**
  A SaaS benchmark stating that a company's revenue growth rate plus profit margin should equal or exceed 40%.
- **Magic Number**
  A sales efficiency metric that measures how much revenue is generated for every dollar spent on sales and marketing.
- **SaaS Quick Ratio**
  The ratio of revenue growth to revenue contraction: (New MRR + Expansion MRR) / (Churned MRR + Contraction MRR).
- **ARPA (Average Revenue Per Account)**
  The average monthly or annual revenue generated per customer account.

Building a Customer Retention Engine

How CS and RevOps work together to protect and grow revenue

Retention is not a department. It is an outcome of deliberate systems, processes, and metrics that detect risk early and drive expansion proactively. This essay connects the concepts that form a complete retention strategy.

Key Terms:

- **Net Revenue Retention (NRR)**
  The percentage of recurring revenue retained from existing customers after expansion, contraction, and churn.
- **Gross Revenue Retention (GRR)**
  The percentage of recurring revenue retained from existing customers, excluding expansion. Measures pure retention.
- **Customer Health Score**
  A composite metric that predicts a customer's likelihood of renewing, expanding, or churning based on usage, engagement, and sentiment data.
- **NPS (Net Promoter Score)**
  A metric that measures customer loyalty by asking how likely they are to recommend the product to others on a 0-10 scale.
- **Customer Effort Score**
  A metric that measures how easy it is for customers to interact with a company or achieve their goals with the product.
- **Time-to-Value (TTV)**
  The elapsed time between when a customer starts using a product and when they first realize meaningful value.
- **Onboarding**
  The process of guiding new customers from purchase to first value, including setup, training, and initial adoption milestones.
- **QBR (Quarterly Business Review)**
  A structured meeting between a CS team and customer stakeholders to review outcomes, align on goals, and plan for the next quarter.
- **Renewal Rate**
  The percentage of customers or revenue that renews at the end of the contract term.
- **Expansion Revenue**
  Additional revenue generated from existing customers through upsells, cross-sells, and usage growth.
- **Attach Rate**
  The percentage of customers who purchase an additional product or module beyond the initial purchase.
- **Contraction MRR**
  The reduction in monthly recurring revenue from existing customers due to downgrades, seat removals, or discount increases.
- **Dunning**
  The process of recovering failed subscription payments through automated retry logic and customer notifications.
- **Logo Retention Rate**
  The percentage of customers that remain active over a given period, regardless of revenue changes.

The RevOps Tech Stack Explained

Understanding the tools that power modern revenue operations

The RevOps tech stack is not a collection of tools. It is an integrated system where data flows between platforms to create a single source of truth. This essay connects the core technologies and concepts that make up a modern revenue technology architecture.

Key Terms:

- **CRM (Customer Relationship Management)**
  The central system of record for customer and prospect data, deal tracking, and sales process management.
- **CPQ (Configure, Price, Quote)**
  Software that helps sales teams configure products, set pricing, and generate accurate quotes while enforcing approval workflows.
- **Marketing Automation Platform (MAP)**
  Software that automates marketing tasks including email campaigns, lead nurturing, and campaign tracking.
- **Data Orchestration**
  The automated movement and transformation of data between systems to maintain consistency and enable workflows.
- **Integration Layer**
  The middleware or iPaaS tools that connect disparate systems and enable data flow across the tech stack.
- **Enrichment**
  The process of appending third-party data to lead and account records to improve segmentation and routing.
- **Data Hygiene**
  The ongoing process of maintaining clean, accurate, and deduplicated data across systems.
- **Data Governance**
  The policies, processes, and standards that ensure data quality, security, and compliance across the organization.
- **Deal Desk**
  A cross-functional team that supports complex deal structuring, pricing approvals, and contract negotiations.
- **Full-Funnel Visibility**
  The ability to track and analyze every stage of the customer journey from first touch to renewal.

Marketing Pipeline Metrics That Matter

Measuring marketing's contribution to revenue, not just activity

Marketing metrics have evolved from vanity metrics to revenue accountability. This essay connects the concepts and metrics that tie marketing activity to pipeline generation and revenue outcomes.

Key Terms:

- **MQL (Marketing Qualified Lead)**
  A lead that marketing has determined meets certain criteria and is ready to be passed to sales for further qualification.
- **Lead Scoring**
  A methodology for ranking leads based on their likelihood to convert, using demographic and behavioral data.

- **Attribution**
  The process of assigning credit to marketing touchpoints that contributed to a conversion or revenue outcome.
- **Marketing Sourced Pipeline**
  Pipeline where marketing activity created the first touch or was the primary driver of opportunity creation.
- **Marketing Influenced Pipeline**
  Pipeline where marketing touched the account or contacts at any point during the buyer journey.
- **Cost Per Lead (CPL)**
  The average cost to generate one lead, calculated by dividing marketing spend by leads generated.
- **Marketing ROI**
  The return on marketing investment, typically calculated as revenue attributed to marketing divided by marketing spend.
- **Demand Generation**
  Marketing programs designed to create awareness and interest in a company's products or services.
- **Demand Waterfall**
  A framework for tracking lead progression through stages from inquiry to closed-won revenue.
- **Dark Funnel**
  Buyer research and engagement that happens outside trackable marketing channels, invisible to attribution systems.
- **Buyer Intent**
  Signals that indicate a prospect is actively researching or considering a purchase decision.
- **Conversion Rate**
  The percentage of prospects that complete a desired action, measured at each stage of the funnel.

Go-to-Market Motion Types

Choosing and optimizing how you sell

Your go-to-market motion is how your company acquires and expands customers. Different motions require different metrics, processes, and organizational structures. This essay connects the concepts that define modern GTM strategies.

Key Terms:

- **Go-To-Market (GTM)**
  The strategy and execution plan for bringing a product to market, including pricing, distribution, and sales approach.
- **Product-Led Growth (PLG)**
  A GTM strategy where the product itself drives acquisition, activation, and expansion through self-service and virality.
- **Sales-Led Growth (SLG)**
  A GTM strategy where sales teams are the primary driver of customer acquisition and expansion.
- **Enterprise Sales**
  A sales motion focused on large organizations with complex buying processes, long sales cycles, and high contract values.
- **Channel Sales**
  A sales motion where revenue is generated through partners, resellers, or distributors rather than direct sales.

- **Land and Expand**
  A strategy of winning a small initial deal and then growing the account through upsells, cross-sells, and departmental expansion.
- **Freemium**
  A pricing model where a basic version of the product is free, with premium features available for paid tiers.
- **Free Trial**
  A time-limited period where prospects can use the full product before committing to a purchase.
- **Inbound Marketing**
  A marketing approach that attracts customers through valuable content and experiences rather than outbound prospecting.
- **Account-Based Everything (ABX)**
  A coordinated GTM approach where marketing, sales, and CS align their efforts around target accounts.
- **ICP (Ideal Customer Profile)**
  A detailed description of the type of company that gets the most value from your product and is most likely to buy.

Compensation and Territory Design

Aligning incentives with outcomes

Compensation plans and territory design are the levers that translate strategy into behavior. Get them right and your team is aligned with company goals. Get them wrong and you create misaligned incentives. This essay connects the concepts that drive effective sales compensation.

Key Terms:

- **OTE (On-Target Earnings)**
  The total expected compensation for a sales rep who achieves 100% of their quota, including base salary and variable pay.
- **Compensation Plan (Comp Plan)**
  The formal structure defining how sales reps are paid, including base, variable, accelerators, and bonuses.
- **Quota**
  The revenue or bookings target assigned to a sales rep or team for a specific period.
- **Quota Attainment**
  The percentage of assigned quota a sales rep or team achieves in a given period.
- **Territory**
  The defined set of accounts or geographic area assigned to a sales rep for prospecting and selling.
- **Capacity Planning**
  The process of determining how many sales reps are needed to achieve revenue targets based on productivity assumptions.
- **Ramp Time**
  The time it takes for a new sales hire to reach full productivity, typically measured as months to first quota attainment.
- **Revenue per Rep**
  The average revenue generated per quota-carrying sales representative.

- **Quota-to-OTE Ratio**
  The ratio of a rep's annual quota to their on-target earnings, used to evaluate quota difficulty relative to pay.
- **Account Scoring**
  A methodology for ranking accounts by their potential value, used to prioritize sales effort and territory assignment.

Data Foundations for RevOps

Building the single source of truth

RevOps without clean data is just opinion. The effectiveness of every metric, forecast, and process depends on the quality and consistency of underlying data. This essay connects the concepts that form the foundation of data-driven revenue operations.

Key Terms:

- **Data Hygiene**
  The ongoing process of maintaining clean, accurate, and deduplicated data across systems.
- **Data Governance**
  The policies, processes, and standards that ensure data quality, security, and compliance across the organization.
- **Enrichment**
  The process of appending third-party data to lead and account records to improve segmentation and routing.
- **Data Orchestration**
  The automated movement and transformation of data between systems to maintain consistency and enable workflows.
- **Full-Funnel Visibility**
  The ability to track and analyze every stage of the customer journey from first touch to renewal.
- **Lead Routing**
  The rules and automation that determine which rep or team receives each incoming lead.
- **Lifecycle Stages**
  The defined stages a lead or customer moves through, from first touch to closed-won and beyond.
- **Handoff**
  The process of transferring a lead or customer from one team or individual to another.
- **Cohort Analysis**
  A method of analyzing customer behavior by grouping customers based on shared characteristics or acquisition timing.
- **Forecasting**
  The process of predicting future revenue based on pipeline, historical data, and rep input.
- **Forecast Accuracy**
  The degree to which the sales forecast matches actual revenue outcomes.

Dashboards

Marketing Dashboard

Demand Generation & Pipeline Creation

The marketing dashboard answers one question: is marketing generating enough high-quality pipeline to feed the revenue plan?

Volume & Efficiency

Cost Per Lead (CPL) • Marketing ROI • Conversion Rate

Pipeline Contribution

Attribution • Lead Scoring

Content & Engagement

Buyer Intent • Account-Based Everything (ABX) • Dark Funnel

Sales Dashboard

Pipeline Management & Deal Execution

The sales dashboard tells you whether the team will hit the number. It tracks pipeline health, deal progression, and rep productivity.

Pipeline Health

Pipeline Coverage • Pipeline Velocity • Weighted Pipeline • Sales Cycle Length

Deal Execution

Win Rate • SQL-to-Close Rate • ASP (Average Selling Price) • Bookings

Rep Productivity

Quota Attainment • Ramp Time • Activity Metrics • Lead Response Time

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Customer Success Dashboard

Retention, Expansion & Customer Health

The CS dashboard focuses on what happens after the sale -- whether customers are healthy, renewing, and growing.

Retention

Churn Rate • Renewal Rate • Gross Revenue Retention (GRR) • Logo Retention Rate

Growth

Net Revenue Retention (NRR) • Net Dollar Retention (NDR) • Expansion Revenue • LTV (Customer Lifetime Value)

Customer Health

Customer Health Score • NPS (Net Promoter Score) • Time-to-Value (TTV)

RevOps Dashboard

Cross-Functional Efficiency & Unit Economics

The RevOps dashboard is the executive view -- unit economics, efficiency ratios, and full-funnel metrics.

Unit Economics

LTV:CAC Ratio • Customer Acquisition Cost (CAC) • CAC Payback Period • ARPA (Average Revenue Per Account)

Revenue & Growth

ARR (Annual Recurring Revenue) • MRR (Monthly Recurring Revenue) • Revenue Velocity

Efficiency Ratios

Burn Multiple • Sales Efficiency Ratio • Magic Number • Rule of 40

Funnel & Process

Stage-to-Stage Conversion • Conversion Rate • Time in Stage • Forecast Accuracy

Dictionary

A

Account Executive (AE)
Role

A sales role responsible for running the full sales cycle from qualified meeting through closed deal.

Account Scoring
Framework · Sales

A model that ranks accounts by their likelihood to buy, expand, or churn based on firmographic, behavioral, and engagement data at the account level.

Account-Based Everything (ABX)
Concept · Marketing

An evolution of ABM that extends account-based thinking beyond marketing into sales, CS, and product. All revenue functions coordinate around a shared set of target accounts.

Activity Metrics
Metric · RevOps

The quantitative inputs (calls, emails, meetings, demos) that leading indicators suggest will produce pipeline and revenue outputs.

Annual Operating Plan (AOP)
Concept

The comprehensive yearly plan that defines revenue targets, headcount, budgets, and the strategy to achieve company goals.

Annual Planning
Framework · RevOps

The yearly process of setting revenue targets, building capacity models, designing territories, finalizing comp plans, and allocating budgets across the revenue org. RevOps typically owns the modeling and cross-functional coordination.

ARPA (Average Revenue Per Account)
Metric · RevOps

The average monthly or annual revenue generated per customer account. Unlike ACV (which measures new deal value) or ASP (which measures closing price), ARPA reflects the ongoing revenue contribution of the entire customer base, including expansion and contraction over time.

ARR (Annual Recurring Revenue)
Metric · RevOps

The annualized value of all active subscription contracts. The north-star metric for SaaS businesses.

ASP (Average Selling Price)
Metric · Sales

The average deal size across closed-won opportunities in a given period.

Attach Rate
Metric · Customer Success

The percentage of customers who purchase an additional product or module beyond the initial purchase, measuring multi-product adoption.

Attribution
Concept · Marketing

The methodology for assigning credit to marketing and sales touchpoints that influenced a deal. Models include first-touch, last-touch, linear, and W-shaped.

Average Contract Value (ACV)
Metric · Sales

The annualized value of a single contract. For multi-year deals, ACV normalizes the total contract value to a per-year figure for consistent comparison.

Average Deal Size
Metric · Sales

The mean contract value of closed-won deals, used for pipeline modeling, forecasting, and segmentation analysis.

B

BANT
Methodology

A classic sales qualification framework assessing Budget, Authority, Need, and Timeline to determine if a prospect is worth pursuing.

BANT
Framework · Sales

A lead qualification framework: Budget, Authority, Need, Timeline. Determines whether a prospect has the resources, power, requirement, and urgency to buy.

Bookings
Metric · Sales

The total value of new contracts signed in a period, including new business, renewals, and expansions. Distinct from revenue, which is recognized over the contract term.

Bottom of Funnel (BOFU)
Concept

The decision stage of the marketing and sales funnel where prospects are ready to buy and need final validation to choose a vendor.

Bowtie Model
Framework · RevOps

A revenue framework shaped like a bowtie, where the left side represents acquisition (awareness to close) and the right side represents expansion (onboarding to advocacy), with the deal at the center.

Burn Multiple
Metric · RevOps

Net cash burned divided by net new ARR. Measures capital efficiency -- how many dollars are burned to generate each dollar of new revenue. Lower is better; under 2x is considered efficient.

Buyer Intent
Concept · Marketing

Behavioral signals that indicate a prospect is actively researching or evaluating solutions. Sources include content consumption patterns, review site visits, competitor comparisons, and search activity.

C

CAC Payback Period
Metric · RevOps

The number of months it takes to recover the cost of acquiring a customer through their gross margin contribution.

Capacity Planning
Framework · RevOps

Modeling how many reps, SDRs, or CSMs are needed to hit revenue targets based on quota, ramp time, attrition, and pipeline assumptions.

Champion/Challenger Testing
Framework · RevOps

A methodology for testing process changes by running a new approach (challenger) against the current standard (champion) with a subset of reps, then measuring which performs better before rolling out org-wide.

Channel Sales
Concept

A sales strategy where you sell through third-party partners such as resellers, distributors, or referral partners rather than directly.

Churn
Metric

The rate at which customers or revenue is lost over a period of time.

Churn Rate
Metric · Customer Success

The percentage of customers (logo churn) or revenue (revenue churn) lost in a given period.

Cohort Analysis
Framework · RevOps

An analytical method that groups customers by a shared characteristic or time period to track how their behavior changes over time.

Compensation Plan (Comp Plan)
Concept · RevOps

The structure defining how reps earn variable pay, including base/variable split, quota, accelerators, decelerators, and clawbacks. RevOps typically models and administers comp plans.

Competitive Intelligence
Framework · Sales

The systematic collection, analysis, and distribution of information about competitors to inform sales strategy, product positioning, and pricing decisions.

Contraction MRR
Metric · Customer Success

The reduction in monthly recurring revenue from existing customers due to downgrades, seat reductions, or discount increases.

Conversion Rate
Metric · RevOps

The percentage of records that advance from one stage to the next (e.g., MQL to SQL, SQL to opportunity, opportunity to closed-won).

Cost per Acquisition
Metric · Marketing

The cost to acquire a single customer or lead through a specific marketing campaign or channel, distinct from the blended CAC metric.

Cost Per Lead (CPL)
Metric · Marketing

Total marketing spend on a campaign or channel divided by the number of leads generated. A foundational efficiency metric for demand generation.

CPQ (Configure, Price, Quote)
Concept · RevOps

Software and process for generating accurate, approved quotes based on product configuration, pricing rules, and discount policies.

Customer Acquisition Cost (CAC)

Metric · RevOps

Total sales and marketing spend divided by the number of new customers acquired in a period.

Customer Effort Score

Metric · Customer Success

A metric that measures how easy it is for customers to interact with a company, resolve issues, or achieve their goals with the product.

Customer Health Score

Concept · Customer Success

A composite metric combining product usage, support tickets, NPS, engagement frequency, and contract data to predict a customer's likelihood to renew or churn.

D

Dark Funnel

Concept · Marketing

The invisible portion of the buyer journey that occurs outside trackable channels -- podcasts, Slack communities, word-of-mouth, private social. Revenue teams can't attribute it, but it drives pipeline.

Data Governance

Concept · RevOps

The policies, standards, and accountability structures that ensure data across revenue systems is accurate, consistent, secure, and compliant. Goes beyond hygiene to include ownership and access controls.

Data Hygiene

Concept · RevOps

The ongoing practice of cleaning, deduplicating, enriching, and standardizing data across revenue systems.

Data Orchestration

Concept · RevOps

The automated movement, transformation, and synchronization of data across revenue systems to ensure every tool has the right information at the right time.

Deal Desk

Concept · RevOps

A cross-functional team or process that manages non-standard deal structures, pricing exceptions, and contract approvals.

Demand Generation

Concept · Marketing

The set of marketing programs designed to create awareness and drive qualified pipeline. Distinct from lead gen in that it focuses on creating demand, not just capturing it.

Demand Waterfall

Framework · Marketing

A framework originally developed by SiriusDecisions that defines the stages a lead passes through from initial inquiry to qualified opportunity.

Discovery Call

Concept · Sales

The first substantive conversation between a seller and a prospect, focused on understanding the buyer's situation, pain, and desired outcomes. The quality of discovery directly predicts deal velocity and win rate.

Dunning

Process · Customer Success

The process of recovering failed subscription payments through automated retry logic, customer notifications, and payment method update prompts.

E

Enrichment
Concept · RevOps

The process of augmenting lead or account records with third-party data (firmographics, technographics, intent signals) to improve routing, scoring, and prioritization.

Enterprise Sales
Concept

A market segment and sales motion focused on large organizations with complex buying processes, multiple stakeholders, and high-value deals.

Expansion MRR
Metric · Customer Success

The additional monthly recurring revenue generated from existing customers through upsells, cross-sells, and plan upgrades.

Expansion Revenue
Metric · Customer Success

Revenue growth from existing customers through upsells, cross-sells, seat additions, and usage increases. Expansion revenue is the engine behind net revenue retention above 100%. Companies with strong expansion motions can grow even with moderate new logo acquisition because existing customers spend more over time.

F

Forecast
Process

A prediction of revenue that will close in a given period, based on pipeline analysis and rep input.

Forecast Accuracy
Metric · RevOps

The percentage difference between predicted revenue and actual closed revenue for a given period. Measures how reliable the forecasting process is. RevOps owns the methodology and tracking.

Forecasting
Concept · RevOps

The process of predicting future revenue based on pipeline data, historical trends, rep judgment, and statistical models.

Free Trial
Concept

A time-limited period where prospects can use the full product for free before deciding to purchase.

Freemium
Concept

A business model where a basic version of the product is free forever, with paid tiers for advanced features or higher usage.

Full-Funnel Visibility
Concept · RevOps

The ability to track and measure every stage of the buyer journey from first touch to closed-won and beyond, without data gaps between teams.

G

Go-To-Market (GTM)

Framework · RevOps

The coordinated structural plan that defines how an organization brings an offering to market, identifies and reaches buyers, positions value, enables conversion, and operationalizes revenue production across channels and teams.

Gross Bookings

Metric · Sales

The total contract value of all new, renewal, and expansion deals signed in a period before accounting for churn or contraction.

Gross Margin

Metric · RevOps

The percentage of revenue remaining after subtracting the cost of goods sold (COGS), measuring the profitability of core operations.

Gross Revenue Retention (GRR)

Metric · Customer Success

The percentage of recurring revenue retained from existing customers excluding expansion. Measures pure churn and contraction.

GRR (Gross Revenue Retention)

Metric

The percentage of recurring revenue retained from existing customers, excluding expansion revenue -- measuring pure retention.

H

Handoff

Concept · RevOps

The structured transfer of a prospect or customer between teams (e.g., SDR to AE, AE to CS). Poor handoffs are the top source of revenue leakage.

Horizontal SaaS

Concept

Software that serves a common function across all industries rather than solving problems specific to one vertical.

I

ICP (Ideal Customer Profile)

Profile

A detailed description of the type of company that would benefit most from your product and be most valuable as a customer.

Ideal Customer Profile (ICP)

Framework · Marketing

A data-driven description of the company that gets the most value from your product. Defined by firmographic, technographic, and behavioral attributes. RevOps uses the ICP to align targeting, scoring, and territory assignment.

Inbound Marketing

Concept

A marketing strategy that attracts customers through valuable content and experiences rather than interruptive advertising.

Integration Layer

Concept · RevOps

The middleware and APIs that connect revenue systems to each other -- CRM to MAP, MAP to data warehouse, CPQ to billing. RevOps designs and maintains the integration layer to ensure data flows accurately between tools.

J

Jobs to Be Done (JTBD)

Framework · Marketing

A framework for understanding why customers buy based on the functional, emotional, and social jobs they are trying to accomplish. RevOps uses JTBD to align messaging, segmentation, and product positioning across the funnel.

L

Land and Expand

Framework · Sales

A go-to-market motion where you close a small initial deal (land) then systematically grow the account through upsells, cross-sells, and seat expansion (expand).

Lead Response Time

Metric · Sales

The average time between an inbound lead submission and the first sales outreach. Research shows response within 5 minutes increases qualification rates by 10x.

Lead Routing

Concept · RevOps

The rules and automation that determine which rep receives an inbound lead, based on territory, round-robin, account ownership, or other criteria.

Lead Scoring

Framework · Marketing

A methodology for ranking prospects against a scale representing perceived value. Combines demographic fit (firmographic) and behavioral signals (engagement).

Lead Scoring

Process

A methodology for ranking leads based on their likelihood to convert, using demographic and behavioral data.

Lead-to-Revenue (L2R)

Framework · RevOps

A framework mapping the complete process from lead capture to revenue recognition, identifying handoff points, conversion rates, and cycle times at each stage.

Lifecycle Stages

Concept · RevOps

The defined statuses a contact or account moves through (e.g., Subscriber, MQL, SQL, Opportunity, Customer). RevOps standardizes definitions across teams.

Logo Retention

Metric

The percentage of customers (logos) retained over a period, regardless of revenue changes within those accounts.

Logo Retention Rate

Metric · Customer Success

The percentage of customer accounts retained over a period, regardless of revenue changes within those accounts. Measures the breadth of churn independent of deal size.

LTV (Customer Lifetime Value)
Revenue · Customer Success

The total revenue a business expects to earn from a customer over the entire relationship. Often expressed as LTV:CAC ratio (3:1+ is healthy).

LTV (Lifetime Value)
Metric

The total revenue a customer generates over their entire relationship with your company.

LTV:CAC Ratio
Metric · RevOps

The ratio of Customer Lifetime Value to Customer Acquisition Cost. The most important efficiency ratio in SaaS -- it tells you whether each customer is worth more than it costs to acquire them. A healthy ratio is 3:1 or higher, meaning each dollar spent on acquisition returns three dollars in lifetime value.

M

Magic Number
Metric · RevOps

Net new ARR in a quarter divided by the prior quarter's sales and marketing spend. Measures go-to-market efficiency (above 0.75 is strong).

Marketing Automation Platform (MAP)
Software · Marketing

Software (e.g., HubSpot, Marketo) that automates campaign execution, lead nurturing, scoring, and attribution. A core system in the RevOps tech stack.

Marketing Influenced Pipeline
Pipeline · Marketing

Pipeline where at least one marketing touchpoint occurred during the buyer journey, regardless of whether marketing created the initial lead.

Marketing ROI
Metric · Marketing

The return on investment from marketing spend, calculated as pipeline or revenue generated divided by total marketing cost. Marketing ROI connects spend to revenue outcomes and is the top-level metric marketing leaders use to justify budget, optimize channel mix, and demonstrate impact to the board.

Marketing Sourced Pipeline
Pipeline · Marketing

Pipeline where the first touch or lead creation was directly attributed to a marketing activity, meaning marketing created the opportunity.

MEDDIC
Methodology

A B2B sales qualification framework focused on understanding the customer's Metrics, Economic Buyer, Decision criteria, Decision process, Identify pain, and Champion.

MEDDPICC
Framework · Sales

A sales qualification framework: Metrics, Economic Buyer, Decision Criteria, Decision Process, Paper Process, Identify Pain, Champion, Competition. Used to rigorously qualify enterprise deals.

Mid-Market
Concept

A market segment between SMB and Enterprise, typically companies with 200-2,000 employees requiring a blend of self-serve and sales-assisted motions.

Middle of Funnel (MOFU)

Concept

The consideration stage of the marketing funnel where prospects are actively evaluating solutions to their problem.

MQL (Marketing Qualified Lead)

Concept

A lead that marketing has determined meets certain criteria and is ready to be passed to sales for further qualification.

MQL (Marketing Qualified Lead)

Concept · Marketing

A lead that has met predefined engagement and fit thresholds set by marketing, indicating readiness for sales follow-up. One of the most debated handoff points in RevOps.

MRR (Monthly Recurring Revenue)

Metric · RevOps

The monthly equivalent of ARR. Useful for tracking month-over-month growth trends.

Multi-Threading

Concept · Sales

The practice of building relationships with multiple stakeholders within a prospect account rather than relying on a single champion. Reduces single-thread risk.

Mutual Action Plan

Framework · Sales

A shared document between buyer and seller outlining milestones, owners, and timelines needed to complete a deal. Reduces deal slippage by creating joint accountability.

N

Net Dollar Retention (NDR)

Metric · Customer Success

The total revenue from a cohort of customers at the end of a period compared to the start, including expansion, contraction, and churn. Functionally equivalent to NRR, often used interchangeably.

Net New ARR

Metric · RevOps

The total change in ARR over a period, calculated as New ARR + Expansion ARR - Churned ARR - Contraction ARR.

Net Revenue Retention (NRR)

Metric · Customer Success

The percentage of recurring revenue retained from existing customers after accounting for churn, contraction, and expansion. Above 100% means expansion outpaces churn.

NPS (Net Promoter Score)

Metric · Customer Success

A customer satisfaction metric that measures how likely customers are to recommend your product to others, scored from -100 to +100. Calculated by subtracting the percentage of detractors (0-6 rating) from the percentage of promoters (9-10 rating). NPS is a leading indicator of retention, expansion, and referral potential.

NRR (Net Revenue Retention)

Metric

The percentage of recurring revenue retained from existing customers over a period, including expansion, contraction, and churn.

O

OKRs for Revenue

Framework · RevOps

The application of Objectives and Key Results to revenue functions. Aligns sales, marketing, and CS around shared outcomes rather than siloed activity targets. RevOps typically owns the measurement layer.

Onboarding

Concept · Customer Success

The structured process of getting a new customer from signed contract to first value. Includes implementation, training, data migration, and success planning. Poor onboarding is the leading predictor of early churn.

OTE (On-Target Earnings)

Metric

The total expected compensation for a sales rep who achieves 100% of their quota, combining base salary and variable commission.

Outbound Sales

Concept

A sales strategy where reps proactively reach out to prospects rather than waiting for inbound interest.

P

Pipeline Coverage

Metric · Sales

The ratio of total pipeline value to quota (e.g., 3x coverage means $3M in pipeline for every $1M in quota). Indicates whether there is enough opportunity to hit target.

Pipeline Velocity

Metric · Sales

How fast deals move through the pipeline. Calculated as: (number of opportunities x average deal size x win rate) / sales cycle length.

Process Automation

Concept · RevOps

Using technology to replace manual, repetitive tasks in the revenue process -- lead assignment, data entry, follow-up sequencing, deal stage updates -- so reps can focus on selling.

Product Qualified Lead

Metric · Marketing

A lead that has demonstrated buying intent through meaningful product usage, such as completing key actions in a free trial or freemium product.

Product-Led Growth (PLG)

Framework · RevOps

A go-to-market strategy where the product itself drives acquisition, conversion, and expansion. Users experience value before talking to sales. RevOps builds the instrumentation layer that connects product usage to revenue outcomes.

Q

QBR (Quarterly Business Review)

Framework · Customer Success

A structured meeting between a CSM and customer to review outcomes, usage, ROI, and roadmap. A core retention and expansion mechanism.

Quota Concept

A revenue or activity target assigned to a salesperson or team, typically set annually or quarterly.

Quota Attainment Metric · Sales

The percentage of a rep's or team's sales target achieved in a period. A core performance metric.

Quota-to-OTE Ratio Metric · Sales

The ratio of a sales rep's annual quota to their on-target earnings, used to evaluate whether quotas are appropriately set relative to compensation.

R

Ramp Time Metric · Sales

The number of months it takes a new sales hire to reach full quota productivity.

Renewal Rate Metric · Customer Success

The percentage of contracts that renew at the end of their term. Can be measured by logo count or dollar value.

Revenue Alignment Concept · RevOps

The structural consistency of goals, definitions, data, incentives, and decision rules across all functions involved in producing revenue, ensuring that each part of the organization operates against the same operational reality.

Revenue Architecture Framework · RevOps

The intentional structural design of how revenue flows through an organization, specifying how people, processes, data, technology, and decision rules interact to produce measurable and repeatable revenue outcomes.

Revenue Engine Concept · RevOps

The operational mechanism within a revenue system that converts demand into closed, retained, and expandable revenue through coordinated execution of defined processes, capacity, automation, and enforcement rules.

Revenue Flywheel Framework · RevOps

A growth framework that models revenue as a compounding system in which acquisition, conversion, retention, and expansion reinforce one another through continuous momentum rather than linear progression.

Revenue Funnel Concept · RevOps

The staged visualization of how prospects move from awareness to closed revenue, with defined entry/exit criteria and conversion benchmarks at each stage.

Revenue Intelligence Concept · RevOps

The practice of capturing and analyzing buyer signals across calls, emails, and CRM activity using AI to surface insights that improve forecasting accuracy, deal inspection, and coaching.

Revenue Leakage Concept · RevOps

Revenue lost through process gaps, billing errors, unenforced pricing, missed renewals, or poor handoffs. A core problem RevOps exists to solve.

Revenue Lifecycle

Concept · RevOps

The full journey from initial lead generation through closed deal, onboarding, renewal, and expansion. RevOps owns the operational layer across this entire arc.

Revenue Maturity Model

Framework · RevOps

A staged assessment of how sophisticated an organization's revenue operations are -- from ad-hoc and reactive (Stage 1) to predictive and fully integrated (Stage 5). Used to diagnose gaps and prioritize improvements.

Revenue Operations (RevOps)

Concept · RevOps

A cross-functional discipline responsible for designing, governing, and optimizing the systems that produce revenue across the full customer lifecycle. RevOps treats revenue as an interconnected system rather than the output of isolated departments.

Revenue per Employee

Metric · RevOps

Total revenue divided by headcount, used as an efficiency benchmark to evaluate how productively a company converts talent into revenue.

Revenue per Rep

Metric · Sales

The average revenue generated per quota-carrying sales rep, used to benchmark individual productivity and inform capacity planning.

Revenue Signal

Concept · RevOps

Any data point -- behavioral, firmographic, or transactional -- that indicates a change in a prospect or customer's likelihood to buy, expand, or churn. RevOps builds systems to capture and route these signals.

Revenue System

Concept · RevOps

The integrated set of inputs, processes, constraints, data structures, and feedback mechanisms through which an organization generates, measures, and sustains revenue across the full customer lifecycle.

Revenue Team

Concept · RevOps

The cross-functional group spanning sales, marketing, customer success, and RevOps that collectively owns the revenue number. A RevOps-driven org treats these as one team, not siloed departments.

Revenue Velocity

Metric · RevOps

A composite measure of how quickly revenue moves through an organization’s revenue system, reflecting the interaction between deal volume, deal value, conversion efficiency, and cycle time.

Rule of 40

Metric · RevOps

A SaaS health benchmark: revenue growth rate + profit margin should equal or exceed 40%.

S

SaaS Quick Ratio

Metric · RevOps

The ratio of revenue growth to revenue contraction, calculated as (New MRR + Expansion MRR) / (Churned MRR + Contraction MRR).

Sales Accepted Lead (SAL)
Concept · Sales

A lead that has been reviewed and accepted by sales as meeting the minimum criteria for outreach. The SAL stage sits between MQL and SQL, serving as the formal handoff point where sales agrees to work the lead.

Sales Cycle Length
Metric · Sales

The average number of days from opportunity creation to closed-won.

Sales Efficiency Ratio
Metric · RevOps

Net new ARR divided by total sales and marketing cost. Measures how efficiently the revenue org converts spend into recurring revenue. A ratio above 1.0 means each dollar spent generates more than a dollar of ARR.

Sales Enablement
Process · Sales

The function responsible for equipping sales teams with the content, training, tools, and processes needed to sell effectively.

Sales-Led Growth (SLG)
Concept

A go-to-market strategy where sales teams are the primary driver of customer acquisition and revenue growth.

SDR (Sales Development Representative)
Role

An entry-level sales role focused on prospecting, qualifying leads, and booking meetings for Account Executives.

Segmentation
Framework · RevOps

The practice of dividing customers, prospects, or markets into distinct groups based on shared characteristics to tailor go-to-market strategy.

Single Source of Truth (SSOT)
Concept · RevOps

A unified, trusted data environment where all revenue teams pull from the same definitions, metrics, and records.

SLA (Service Level Agreement)
Framework · RevOps

A formal agreement between teams (e.g., marketing commits to X leads, sales commits to Y follow-up time). RevOps defines, measures, and enforces SLAs.

SMB (Small and Medium Business)
Segment

A market segment consisting of smaller companies, typically characterized by faster sales cycles, lower deal values, and self-serve or inside sales motions.

SPICED
Framework · Sales

A deal qualification framework: Situation, Pain, Impact, Critical Event, Decision. Focuses on understanding the buyer's world rather than checking boxes about budget or authority.

SPIFF
Concept · Sales

A short-term incentive bonus paid to reps for selling a specific product, hitting a micro-goal, or driving a strategic behavior. Used tactically to shift rep focus.

SQL (Sales Qualified Lead)
Concept · Sales

A lead that sales has accepted and validated as a real opportunity worth pursuing, based on direct conversation and qualification criteria.

SQL-to-Close Rate

Metric · Sales

The percentage of Sales Qualified Leads that convert to closed-won deals. Measures the effectiveness of the sales process after marketing handoff.

Stage-to-Stage Conversion

Metric · RevOps

The rate at which opportunities advance between specific pipeline stages. Reveals where deals stall or leak.

Systems of Record

Concept · RevOps

The authoritative source for a given data type (e.g., CRM for deals, MAP for campaigns). RevOps is responsible for defining and enforcing which system owns what.

T

TAM, SAM, SOM

Concept

Three levels of market sizing -- Total Addressable Market, Serviceable Addressable Market, and Serviceable Obtainable Market.

Tech Stack

Concept · RevOps

The collection of software tools used across the revenue org. RevOps owns the architecture, integration, and rationalization of this stack.

Territory

Concept

A defined set of accounts or geographic region assigned to a salesperson, designed to balance workload and opportunity.

Territory Design

Framework · RevOps

The process of dividing a market into segments and assigning them to reps based on geography, industry, company size, or other attributes to balance workload and opportunity.

Time in Stage

Metric · RevOps

How long an opportunity sits in a given pipeline stage before advancing or dying. Flags stuck deals.

Time-to-Value (TTV)

Metric · Customer Success

How quickly a new customer reaches their first meaningful outcome after signing. Shorter TTV correlates with higher retention and expansion.

Top of Funnel (TOFU)

Concept

The awareness stage of the marketing funnel where prospects first discover your company through broad-reach content and campaigns.

U

Usage-Based Pricing

Concept

A pricing model where customers pay based on how much they use the product rather than a flat subscription fee.

V

Vertical SaaS
Concept

Software built specifically for one industry, with features, workflows, and language tailored to that vertical.

W

Waterfall Model
Framework · RevOps

A demand generation framework that tracks how marketing-sourced leads flow through sequential stages -- from raw inquiries to MQLs, SALs, SQLs, and pipeline -- with clear conversion benchmarks at each step.

Weighted Pipeline
Framework · RevOps

A forecasting method that multiplies each deal's value by its probability of closing based on stage. A $100K deal at 40% probability contributes $40K to the weighted forecast.

Win Rate
Metric · Sales

The percentage of qualified opportunities that result in a closed-won deal.

Win/Loss Analysis
Framework · Sales

A structured process for reviewing closed deals to understand why opportunities were won or lost, used to improve sales strategy and competitive positioning.